



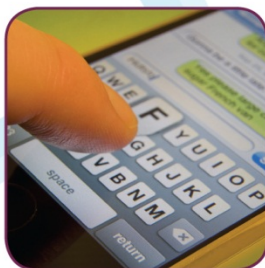
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THE LONDON SCHOOL
OF ECONOMICS AND
POLITICAL SCIENCE ■

Policy Influences and Country Clusters

A COMPARATIVE ANALYSIS OF INTERNET SAFETY POLICY IMPLEMENTATION



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- Helsper, E.J., Kalmus, V., Hasebrink, U., Sagvari, B., and de Haan, J. (2013). Country classification: Opportunities, risks, harm and parental mediation. <http://eprints.lse.ac.uk/52023>
- Livingstone, S., Kirwil, L., Ponte, C., and Staksrud, E., with the EU Kids Online Network (2013). *In their own words: What bothers children online?* LSE, London: EU Kids Online. <http://eprints.lse.ac.uk/48357>
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- Livingstone, S., Ólafsson, K., O'Neill, B., and Donoso, V. (2012). *Towards a better internet for children: Findings and recommendations from EU Kids Online to inform the CEO coalition*. LSE, London: EU Kids Online. <http://eprints.lse.ac.uk/44213>
- Haddon, L., Livingstone, S., and the EU Kids Online Network (2012). *EU Kids Online: National perspectives*. LSE, London: EU Kids Online. <http://eprints.lse.ac.uk/46878>
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The EU Kids Online network has been funded by the EC Safer Internet Programme in three successive phases of work from 2006-14 to enhance knowledge of children's and parents' experiences and practices regarding risky and safer use of the internet and new online technologies.

As a major part of its activities, EU Kids Online conducted a face-to-face, in home survey during 2010 of 25,000 9- to 16-year-old internet users and their parents in 25 countries, using a stratified random sample and self-completion methods for sensitive questions. Now including researchers and stakeholders from 33 countries in Europe and beyond, the network continues to analyse and update the evidence base to inform policy.

For all reports, findings and technical survey information, as well as full details of national partners, please visit www.eukidsonline.net

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SUMMARY

EU Kids Online has developed a four cluster classification of 25 European countries based on the activities undertaken, the exposure to risk and harm, and type of internet safety mediation experienced by young people across Europe.

The purpose of this report is to add a further dimension by examining the policy context and to look at how countries within each cluster approach implementation of internet safety. Implementation in this context refers to a) policy frameworks and b) policy actions undertaken at the individual country/regional level.

Comparing cross-national differences between countries reveals something of a dividing line between parts of Europe that enjoy better support and those that receive somewhat less public support for internet safety.

Countries in the ‘**Supported Risky Explorers**’¹ and ‘**Protected by Restrictions**’² clusters engage more visibly and deploy more initiatives in promoting safer internet practices than those countries in ‘**Semi-supported Risky Gamers**’³ or ‘**Unprotected networkers**’.⁴

Countries in the ‘**Semi-supported risky networkers**’ and ‘**Unprotected networkers**’ clusters display a relatively uneven range of commitments. Noticeably, they invest less than other countries, have a lower level of

public sector involvement, and with less evidence of coordination.

In the absence of local or national initiatives Safer Internet Centres adopt a more prominent role in online safety.

By contrast, the countries in the ‘**Protected by restrictions**’ cluster have done more to establish structures, and to enact legal and regulatory frameworks around online safety albeit to the detriment of promoting online opportunities.

Countries in the ‘**Supported risky explorers**’ cluster have higher levels of public sector involvement, complementary to the Safer Internet Centres. There is more evidence of budget investment and evaluation of policy outcomes. There are higher levels of internet diffusion and digital skills among both parents and children, and a more proactive approach to mediation.

Policy implications of this analysis include:

- Rather than a single solution for safer internet policy, **it is support for a broad spectrum of activities** involving multiple stakeholders and using diverse methods that matters most.
- **Coordination**, whether undertaken by a designated agency or multi-stakeholder representative body, **is therefore a key element in ensuring effective policy development.**
- Countries across Europe have different starting points when it comes to policy implementation. Therefore, **sharing good practices and learning from what works best is crucial.**

¹ Denmark, Finland, Norway, Sweden and the Netherlands.

² Belgium, France, Germany, Greece, Ireland, Italy, Portugal, Spain, Turkey and the UK

³ Bulgaria, Cyprus, Czech Republic, Estonia, Poland and Romania

⁴ Austria, Hungary, Lithuania and Slovenia

INTRODUCTION

This report presents an analysis of cross-national differences in European internet safety implementation. It draws from diverse sources and employs both a ‘top-down’ and ‘bottom-up’ approach to assess:

1. If governance of internet safety in European countries coincides with the same or similar patterns of online opportunities, risks, and experience of harm;
2. If policy actions or initiatives within European countries are associated with particular patterns of online opportunities, risks, and experience of harm;
3. In light of the above, where and how should policy makers intervene to support a better internet for children.

Internet safety, especially for children and young people, is an important policy priority in all European countries. Yet, how it is implemented is subject to considerable variation. Just as young people’s experiences of online risks present a quite varied landscape across Europe, so too the diversity of policy responses to promoting internet safety is remarkable. A common European infrastructure does exist, brought about by the creation – with the support of European Union co-funding – of Safer Internet Centres in each country. However, when it comes to the implementation of policy frameworks or implementing particular actions or initiatives, each country chooses its own level of participation, revealing different emphases, priorities and levels of investment.

This report examines the policy context for internet safety within this European landscape. Building on the EU Kids Online country classification of internet risks and safety (Helsper, Kalmus, Hasebrink, Sagvari, & Haan, 2013), this analysis looks to the additional dimension of the policy framework and policy actions initiated within each country. Drawing on data collected for the European Commission as part of its benchmarking study, the aim of this report is to present a preliminary analysis of what works in terms of better internet policy.

Do countries’ individual actions make a difference? Are some parts of Europe safer than others because of the actions that governments have taken? Cross-country comparative analysis is itself a complex task (Hasebrink & Lobe, 2013) and making comparisons across regulatory and policy regimes especially so (Lobe, 2011). In this report, we highlight where policy frameworks and initiatives coincide with particular configurations of internet use, risk and mediation. This is not to suggest a causal link but rather to present further insights into the varying context in which internet safety policy is implemented across different parts of Europe.

Comparative Methods

In 2013, EU Kids Online presented a revised classification of European countries (Helsper et al., 2013). Where the previous classification was based simply on the percentage of children in each country who

used the internet daily, and who had encountered one or more risks (see Haddon & Livingstone, 2012),¹ the revised approach examines the range and type of online opportunities, risks and harm experienced by the children in each country and also takes into account the ways in which parents mediate or regulate their children's internet use. The new analysis results in a classification based on four country clusters:

- **Supported risky explorers'**
- **Semi-supported risky gamers**
- **Protected by restrictions**
- **Unprotected networkers**

The purpose of the classification is to allow for a more finely-tuned analysis on which to compare countries' experiences of use, risk and mediation.

Do particular national or regional policy frameworks or policy actions reduce risk, increase online opportunities or affect the nature and extent of parental mediation? In order to examine the policy landscape within each of these clusters, the following analysis draws on research undertaken for the European Commission by Idate and Technopolis (2013) as part of benchmarking study of European safer internet policy (hereafter EC benchmarking study).²

This report synthesizes data from both the EU Kids Online country classification and the EC benchmarking study in order to deepen an understanding of the contribution that public policy makes to internet safety outcomes. The analysis was based on the hypothesis that

patterns of public policy frameworks and public policy actions/initiatives in each European country will reflect equivalent patterns of children's online opportunities, risk and mediation.

For the purposes of the EC benchmarking study, consultants Idate and Technopolis conducted an initial scoping study, using two separate sets of indicators to evaluate the level and coverage of public policy on internet safety in each country of the European Union.

The first set of indicators was used to evaluate the public policy framework within each country. It included indicators to identify the governance arrangements, the scope of policies adopted, the legal and regulatory framework and the use of research, monitoring and evaluation to support policy. This 'policy framework' set of indicators was used to characterise the establishment of internet safety as a priority area within public policy within individual countries. Indicators were arranged according to a 3 point scale, ranging from Level 1, the lowest level of implementation to Level 3, the highest level of implementation according to criteria outlined in Table 1 (page 7).

Accordingly, a high level of policy support implies the designation of specific agencies with responsibility to coordinate comprehensive policies, backed up by research and evaluation; lower levels of policy implementation are more likely to be reflected in poorly coordinated policies, no identifiable responsible agencies and a lack of research or any evaluative framework.

Table 1
Indicators for public policy framework

Level	Level 1	Level 2	Level 3
Indicator			
Governance: Responsible bodies/agencies	No specific public policies	Single or silo public policies with no coordination platform	Existence of specific government framework and/or a coordination platform for the Ministries/ involved
Scope of the public policy/ies	One pillar of the EU strategy	Two to three pillars of the EU strategy	All four pillars of the EU strategy
Legal & regulatory framework, beyond the EC directives	No specific laws/directives beyond the EC directives	Specific laws/directives covering one pillar of the EU strategy	Specific laws/directives covering two pillars or more of the EU strategy
Collection of strategic information	No specific data collection beyond EU Kids Online	Only quantitative information	Both quantitative and qualitative information
Monitoring / evaluation of policy results	No indicators, no evaluation	Evaluation	Target indicators and monitoring/evaluation

(Idate & Technopolis, 2013)

The second set of indicators (a shortened list from those developed for the EC benchmarking study) refers to activities or initiatives undertaken at the national level to promote internet safety (Table 2, page 8). Indicators include the scope of activity undertaken (as defined by pillars of EC strategy on internet safety), the involvement of

stakeholders, roles of the public sector, the role of the Safer Internet Centre (SIC) and budget effort beyond that of the Safer Internet Centres. As with indicators for public policy framework, policy actions are arranged in ascending level according to scope and level of implementation.

Table 2
Indicators for policy actions/initiatives

Level	Level 1	Level 2	Level 3
Indicator			
Scope of the initiatives	One pillar of the EU strategy	Two to three pillars of the EU strategy	All four pillars of the EU strategy
Active involvement of the 3 main stakeholder groups (<i>Public agencies, citizen NGOs and industry, including SIC</i>)	Only some of the main actors are involved considerably, with limited collaboration	Only some of the main actors are involved considerably, in close collaboration	Considerable involvement of all 3 main actors in close collaboration
Role of the public sector beyond education/curriculum and police	Limited involvement of public administration	Involvement of public administration	Strong driver and/or proactive involvement
Role of the Safer Internet Centre	Activities inside and outside SIC sometimes overlapping	Activities inside and outside SIC mostly complementary	Important platform for the coordination of the initiatives
Budget effort (public policies/actions) beyond the SIC	No budgets are identified	Budgets dispersed without specific allocations	Well documented and allocated budgets

(Idate & Technopolis, 2013)

Policy actions or initiatives in internet safety are measured according to the level of participation of the three main stakeholder groups and the level of the involvement of the public sector. How active a role the public sector plays beyond its commitment to law enforcement and education is one measure of policy action. Another is involvement of the main stakeholder groups such as public agencies, civil society and industry. Similarly,

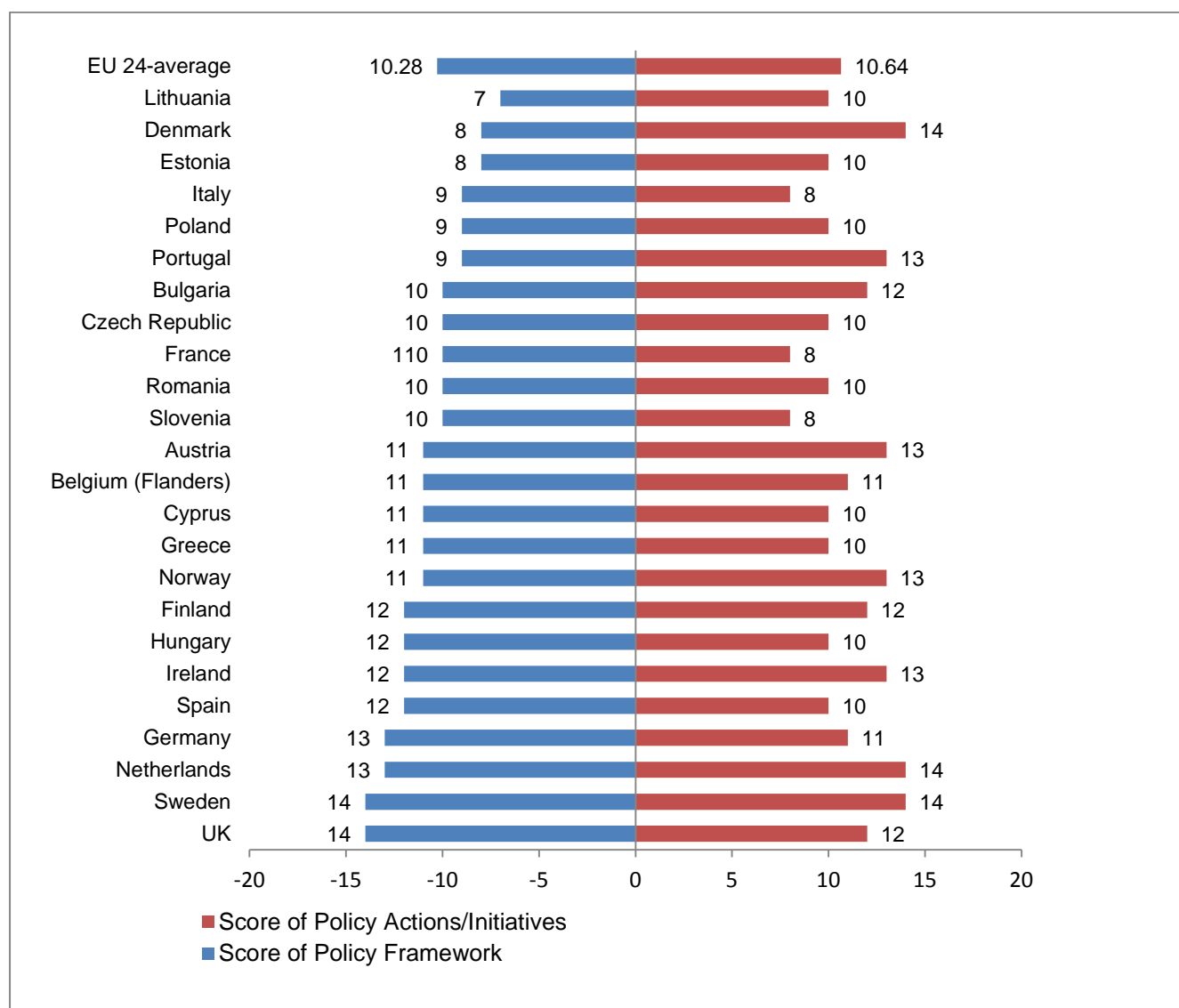
matching funding through budgetary investment beyond the Safer Internet Centre is a further criterion of policy action at the national level. The role performed by the Safer Internet Centre in each country provides a further measure of effective policy action. In some instances, the Safer Internet Centre may act as the coordinating platform in the absence of any viable national alternative. In other cases, a more complementary role

implies a better balance between national initiatives and those of the EU-funded structures.

produce an overview for all 24 countries (excluding Turkey which was not part of the benchmarking study).

Figure 1 combines ratings for (a) policy framework and (b) policy actions/initiatives to

Figure 1
Policy Overview for EU Kids Online 24 Countries



The benchmarking study compiled scores for each individual country's policy framework and policy action with a score of ranging from 1 to 3 assigned to each of the above indicators.³ Stakeholder consultation in each

European country supported by desk research was used to inform scores. Members of the EU Kids Online network validated ratings and also provided additional contextual information. These ratings do not comprise a

scoreboard as such but provide a preliminary basis on which to assess policy within individual countries.

In both sets of indicators, the scope of public policy and policy actions is benchmarked against the key pillars of EU better internet strategy.

In 2012, the European Commission set out the following four main goals or pillars of its European Strategy for a Better Internet for Children to include:

- 1. Supporting high quality content online for children and young people;**
- 2. Stepping up awareness and empowerment;**
- 3. Creating a safe environment for children online; and**
- 4. Fighting against child sexual abuse and child sexual exploitation**
(European Commission, 2012).

At a minimum (Level 1), all Member States, pursuant to European Directives, are expected to implement measures against Pillar 4: fighting against child sexual abuse and child sexual exploitation. In many cases, individual countries undertake proactive measures to support two or more pillars of EU strategy (Level 2) and in some instances may adopt a comprehensive approach implementing all four pillars of EC strategy (Level 3).

The left-hand grading presents a hierarchy of policy frameworks across the EU24 countries based on a scale from 0 to 15. Two countries, UK and Sweden, stand out with the highest score of 14 out of 15 in the five indicators concerned. This points to the highest level of

public policy development based on designated agencies with responsibility for governance and internet safety, specific laws covering safety themes and relevant research, monitoring and evaluation. 8 countries out of the 24 are in the upper third of the EU-24 range. Lithuania in this context is at the lower range.

The dimension of policy actions/initiatives in Figure 1 (page 9), shows Denmark, Netherlands and Sweden with the highest levels of activity at national level. France, Italy and Slovenia are at the lower end of policy implementation. A higher average score is recorded for policy actions/ initiatives compared to policy framework suggesting that countries in this policy domain at least have placed more emphasis on programmes of action rather than on governance. Individual scores are intended purely as a heuristic to understand policy dynamics within countries. Interestingly, Denmark, a country that scores relatively low policy framework, is among the highest for policy actions/initiatives. By contrast, the UK and Germany have a high policy framework score but have somewhat lower scores for policy actions/initiatives.

A further step of the analysis is to assess all four clusters in the EU Kids Online country classification against those indicators of policy framework and policy actions/initiatives to compare cross-national differences and similarities. The purpose of this is to better understand each of the clusters in terms of policy structures and its action and initiatives. It also facilitates a deeper understanding of the national context through comparison with other countries.

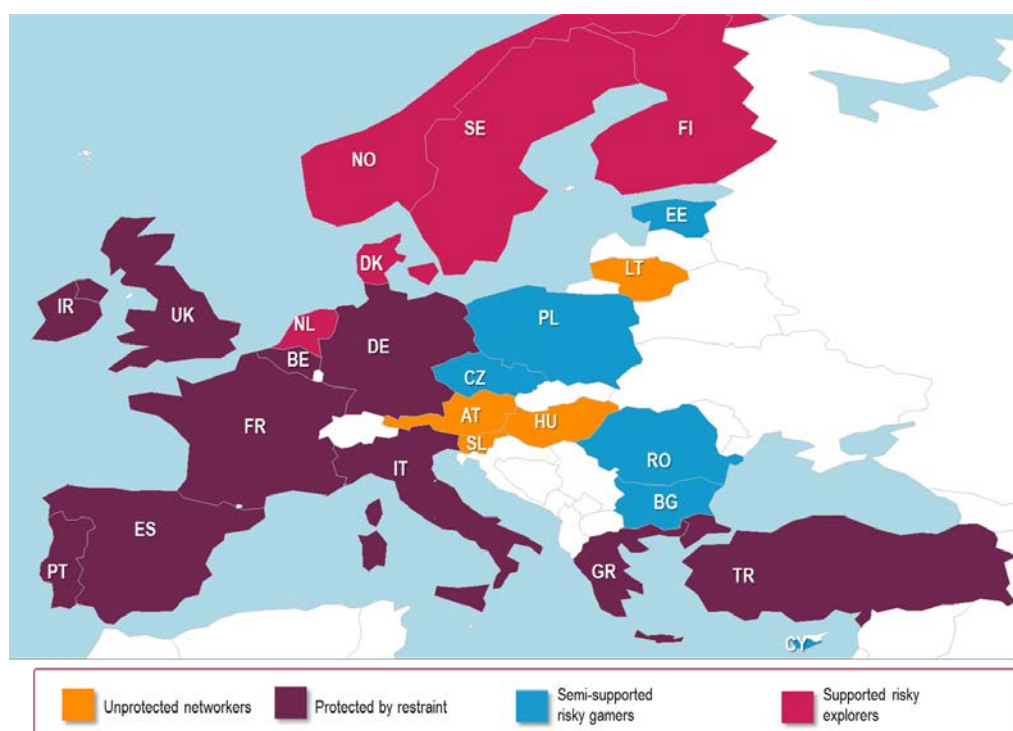
COUNTRY CLUSTERS AND POLICY FRAMEWORKS

Country Classification

The country classification developed by EU Kids Online presents an overview of cross-national differences among the 25 countries included in the survey. The classification examines the range and type of online

opportunities, risks and harm experienced by children and young people in each country. It also takes into account the ways in which parents mediate or regulate their children's internet use in each country.

Figure 2:
Country classification based on opportunities, risks/harm and parental mediation



A grouping of countries in 4 distinct clusters was developed as follows:

1. **Supported risky explorers** (Denmark, Finland, Norway, Sweden and the Netherlands). This group of countries contains more children who are experienced social networkers

who encounter more sexual risks online and whose parents are actively involved in guiding their children's internet use.

2. **Semi-supported risky gamers** (Bulgaria, Cyprus, Czech Republic, Estonia, Poland and Romania). This cluster comprises children who encounter only moderate online opportunities, mainly focused on entertainment, and games in particular but experience relatively high levels of risk and harm.
3. **Protected by restrictions** (Belgium, France, Germany, Greece, Ireland, Italy, Portugal, Spain, Turkey and the UK). This cluster is characterised by relatively low levels of risk probably because internet use is also more limited and largely restricted to practical activities. While parents might be glad that their restrictive mediation practices prevent risk, it does seem that they may miss out on many of the online opportunities.
4. **Unprotected networkers** (Austria, Hungary, Lithuania and Slovenia). This is a cluster of countries where children's experiences are fairly narrow but potentially problematic: the social aspects of Web 2.0 seem to have been taken up with gusto and the children subsequently encounter risks but not as much harm, from being in contact with these opportunities.

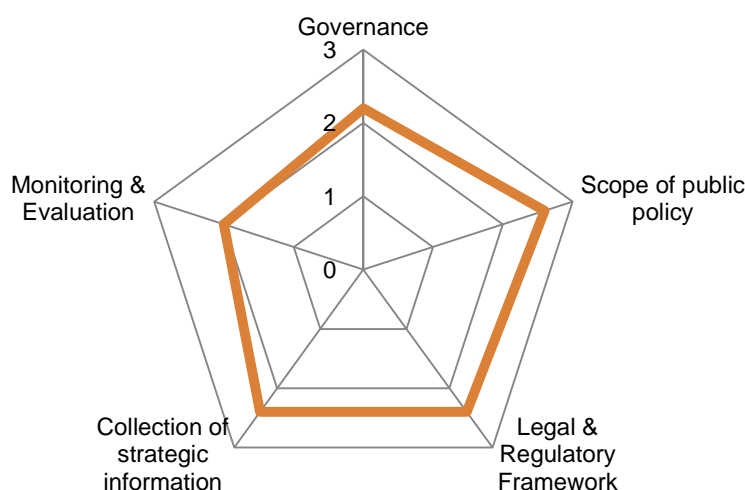
Supported Risky Explorers

This is a cluster of five countries, predominantly Scandinavian but also including the Netherlands, in which children who encounter sexual risks are more strongly represented and where more experienced networkers can be found. It is also a cluster where parents are more actively involved in guiding their children's internet use. In these countries, the level of internet diffusion is also relatively high, with parents generally more digitally skilled and aware of online risks compared to other countries.

As observed by Helsper et al.,(2013) the focus seems to be on supporting children to develop in a digital environment where risks will be encountered.

Given the high levels of diffusion and parental mediation, it may be expected that public policy on internet safety is well established in these countries with relatively high levels for internet awareness raising, education and policy support. Figure 3 provides an overview of the policy framework in the 'Supported Risky Explorers' cluster.

Figure 3: Policy Framework for 'Supported Risky Explorers'

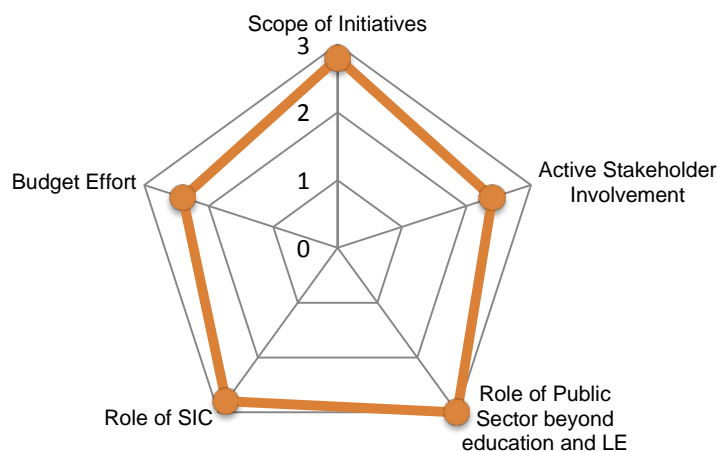


The ‘Supported Risky Explorers’ cluster comprises 5 Scandinavian and Northern European countries: **Denmark, Finland, the Netherlands, Norway and Sweden**. In countries such as Sweden, there is a single agency coordinating internet safety in the country in the form of a Media Council or Authority.⁴ In the other countries, such as Denmark, responsibility is typically spread over several ministries, with no specific overarching coordination body. Policy emphases vary with media literacy a topic of significant focus in Finland (Haddon & Livingstone, 2012) while Norway has a long tradition of supporting children’s rights. A high priority is also attached to research and the collection of strategic information within this cluster and there is greater attention to evaluating policy outcomes.

Policy actions for the ‘Supported Risky Explorers’ cluster also show a high level of

engagement in activities supporting a better internet for children (Figure 4). Based on information supplied as part of the benchmarking process, the public sector in each of the five countries is a strong driver with proactive involvement in promoting online safety. The Safer Internet Centre likewise is an important platform for coordination of activities, acting in a complementary way with national initiatives. The scope of the initiatives themselves is comprehensive, covering all pillars of EU strategy with considerable involvement of relevant stakeholders across civil society, industry and the public sector. Importantly also, each of the countries supports efforts with budgetary investment with well-documented budgets allocated in Sweden and the Netherlands and supported also in less defined ways in Norway, Denmark as well as Finland

Figure 4
Policy Actions/initiatives for ‘Supported Risky Explorers’



'Supported Risky Explorers': Summary of key points

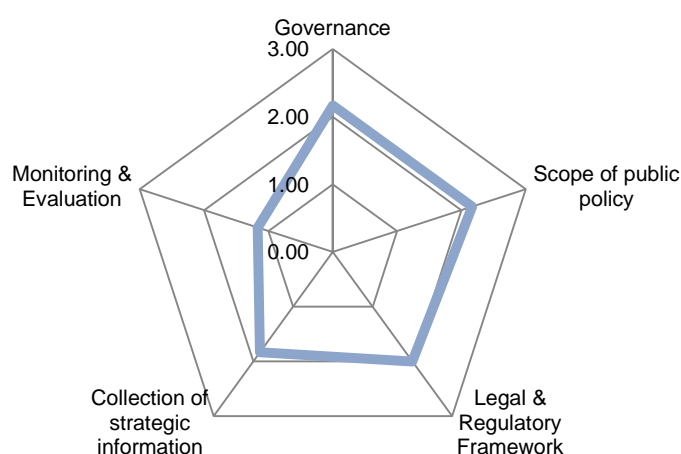
- Governance is typically a shared ministerial responsibility with an emphasis on media regulatory authorities a leadership role
- Public policy covers a range of goals beyond the basic pillar of child protection
- Research is a priority and receives extensive public support
- Outcomes of policy actions are subject to on-going monitoring though more systematic evaluation remains an on-going challenge.
- Extensive proactive public sector support
- Comprehensive approach to online safety
- Considerable involvement of all relevant stakeholders
- Safer Internet Centre is an important platform for coordination
- Evident budget support for online safety initiatives

Semi-supported Risky Gamers

This cluster comprises a group of six countries (**Bulgaria, Cyprus, Czech Republic, Estonia, Poland and Romania**), many of which were previously classified as ‘new use, new risk’ countries and which are predominantly situated in Eastern Europe (Haddon & Livingstone, 2012). Children’s internet use in these countries, while extensive, is mainly focused on entertainment and gaming. Relatively high levels of risk are experienced. Though diverse strategies of mediation are practiced, they seem, in the main, to be ineffective, resulting in varied risk patterns (Helsper et al., 2013).

With the relatively recent onset of extensive internet adoption in these new markets and their more recent accession in 2004 to the European Union, it may be expected that public policy in this area is less well established than in other parts of Europe. Data compiled as part of the benchmarking study (and aggregated here for the cluster) confirms this. Figure 5 shows the lowest overall average of any of the four clusters identified by EU Kids Online.

Figure 5:
Policy Framework Overview ‘Semi-supported Risky Gamers’



Governance arrangements are primarily organised around single or silo public policies with no coordination platform. The scope of

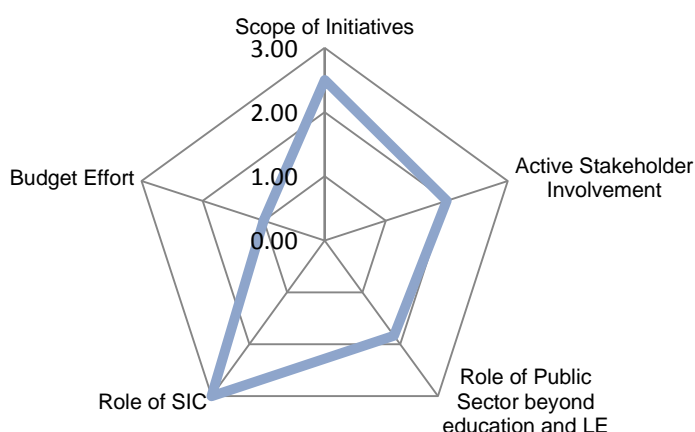
public policy covers two to three pillars of EU strategy though in some instances, such as Romania, the policy framework is more comprehensive.⁵ The legal and regulatory framework is confined to tackling child sexual abuse and exploitation. In none of the countries does it cover all four pillars of EC better internet strategy. Research and collection of strategic information is varied. Again, monitoring or evaluation of policy actions or outcomes is infrequent.

While debates on internet governance and safety are relatively recent in origin, these policy issues are actively discussed and promoted. In Bulgaria, a National Child Strategy 2008-18, including child online safety, has been adopted.⁶ Estonia's Information Society Development Plan is a comprehensive ICT development plan which has strongly promoted digital opportunities for Estonian society.⁷ Poland likewise has endorsed all four

strategic pillars of EC better internet strategy and has initiated education policies to support ICT skills development, including internet safety. Similarly, Romania has adopted a 'Digital Agenda 2020' policy framework that includes goals to tackle 'harmful content' on the internet.

Looking at policy actions for 'Semi-supported risky gamers', what stands out (Figure 6) is the important role played by the Safer Internet Centre (SIC) within each country in this cluster. The SIC is central to coordination and implementation of activities partly to balance the relatively low profile of the public sector, outside of law enforcement and education. Stakeholder involvement is restricted to some key actors though close collaboration is acknowledged. It is also the case that no specific budget is defined for safer internet activities.

Figure 6:
Policy Actions/initiatives Overview 'Semi-supported Risky Gamers'



‘Semi-supported Risky Gamers: Summary of key points

- Governance arrangements lack coordination
- Policy developments are relatively recent in origin
- New initiatives focus on ICT development
- Monitoring and evaluation of policy is largely absent
- Safer Internet Centres provide a key platform for coordination of online safety activities
- The public sector is less involved than in other parts of Europe in promoting internet safety
- No targeted budgets are provided for internet safety

Protected by Restrictions

This is the largest cluster within the country classification. Comprising ten countries (**Belgium, France, Germany, Greece, Ireland, Italy, Portugal, Spain, Turkey and the UK**), this cluster represents those countries that have relatively low levels of risk and harm. Patterns of use are also relatively low and limited to practical activities. Restrictive mediation tends to dominate and while this may prevent some children being exposed to higher risk and harm and sexual or contact risks, it also has the effect of them missing out on online opportunities. In these countries, the emphasis seems to be on safeguarding children by trying to minimise risk and thereby restricting their broader engagement.

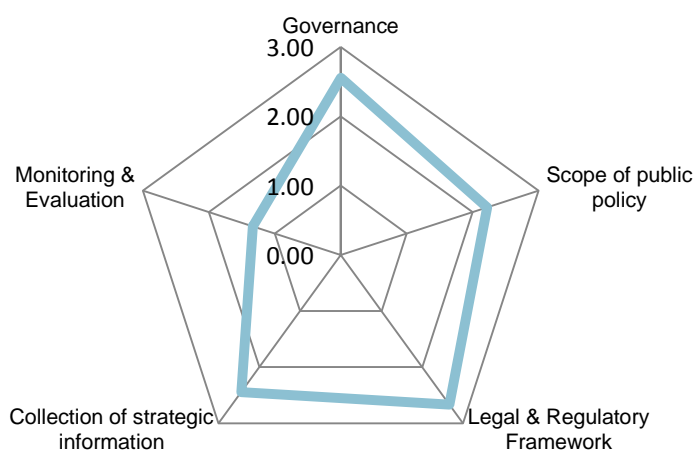
Countries in this cluster have a long track record of promoting internet safety and it may be expected that public policy frameworks and infrastructure are better established.

Figure 7 presents an overview of the main indicators of policy development.

As in the 'Supported Risky Explorers' cluster, this group of countries has a comprehensive legal and regulatory framework. 5 of the 10 countries have a designated authority or coordination platform for internet safety policy.

The scope of public policy includes two to three pillars of EC better internet strategy. In Germany and Greece, all four pillars are covered within policy frameworks.

Figure 7:
Policy Framework Overview 'Protected by Restrictions'



Evidence-based policy is feature of the policy making process in these countries, though only in the UK are target indicators and monitoring/evaluation undertaken.

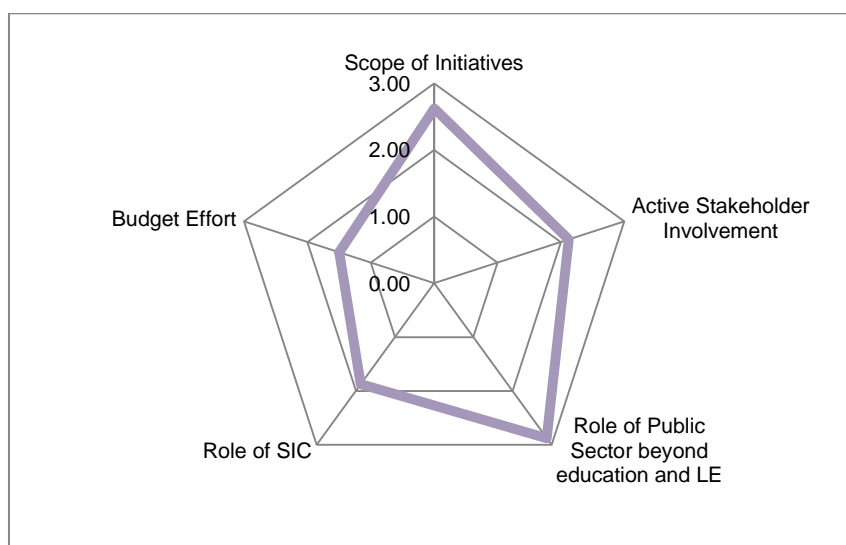
Governance of national internet safety features strongly within this cluster. The UK's Council for Child Internet Safety (UKCCIS), in particular, acts as a model of multi-stakeholder governance and policy coordination bringing together a wide range of government, industry, civil society and academic research interests.⁸ In Germany, a diverse range of regulatory authorities at the regional level coordinate both traditional media and internet safety concerns and combine them with extensive stakeholder engagement.⁹

Policy is also underpinned by an extensive range of research initiatives beyond the European-funded studies of EU Kids Online. Monitoring surveys are represented in most countries with a particular focus on ICT skills

and use. Linking media literacy and internet safety policy is also a characteristic of many of the initiatives involved.

In the case of internet safety policy action, the proactive role of the public sector again stands out, acting as a stronger driver for intervention (Figure 8). Policy initiatives are extensive. 5 of the 10 countries cover all four goals of better internet strategy. Stakeholders are actively engaged in the process of promoting internet safety with the exception of France and Greece where only limited involvement is evident. In two of the countries (Ireland and Portugal), the Safer Internet Centre has a central coordination platform. In other countries, its role is seen as complementary to other public sector and civil society activities. Details on budgetary commitments are sketchy and despite the extensive awareness raising and education efforts, only 4 countries report budget dispersed through ministerial sources.

Figure 8:
Policy Actions/Initiatives Overview 'Protected by Restrictions'



Summary of key points

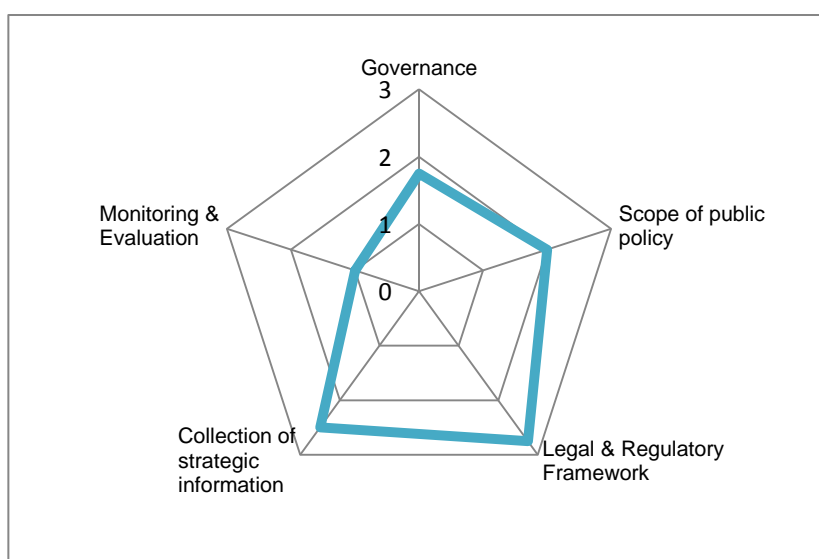
- High profile, designated agencies as responsible bodies for internet safety in many countries
- Strong legal and regulatory framework, comprehensive approach to provision
- Wide range of research initiatives evident with a number of monitoring surveys undertaken
- Proactive public sector intervention acts as a strong driver for education, awareness raising and empowerment
- Comprehensive range of policy initiatives
- Safer Internet Centre important for coordination or acts in a complementary way to public policy developments

Unprotected Networkers

The final group of four countries (**Austria, Hungary, Lithuania and Slovenia**) is a cluster of countries where children's experiences are fairly narrow but potentially problematic: communication and social interaction online feature strongly, thereby leading children to encounter relatively high levels of risk. Parents are not as involved in their children's internet use as other clusters. This poses the danger that children's use becomes more intensive, they may also encounter more risks and subsequent harm. Understanding why parental mediation is not as effective may have something to do with the availability of parental guidance and awareness raising and therefore it is important to look at the policy context for initiatives in this area (Figure 9).

In this cluster of four countries, governance structures are noticeably weaker than in other clusters with no country having a designated agency or single government framework for the topic of internet safety. While a comprehensive legal and regulatory framework exists, public policy is more limited in approach and restricted to one or two pillars of EU strategy such as combatting child sexual abuse and exploitation (see Table 9). Despite this, research of both a qualitative and quantitative nature is undertaken (e.g. by the Statistical Office of the Republic of Slovenia)¹⁰, and a number of overarching policies (e.g. Hungary's Cyber Security Strategy)¹¹ exist which cover the main themes of better internet strategy. Noticeably, monitoring and evaluation of policy results is absent with no indicators or evaluation undertaken.

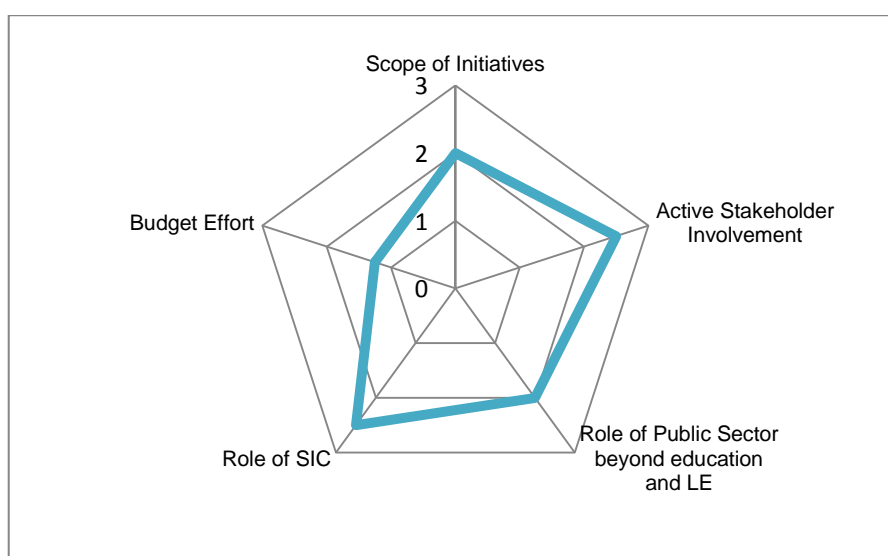
Figure 9:
Policy Framework Overview 'Unprotected Networkers'



Policy actions in this cluster present a varied picture (Figure 10). Austria is more typical of other western European countries (for instance, the 'Protected by Restrictions' cluster) with strong public sector involvement on the part of several ministries as well a strong coordinating role for the Safer Internet Centre.¹² Stakeholders are also actively involved and, crucially, budgets dispersed through several government departments, are

in evidence. The other countries in the cluster are closer to the profile of 'Semi-supported risky gamers' with a lower level of public sector involvement and less stakeholder involvement and no identified budget commitment to internet safety. In this context, the Safer Internet Centres become all the more important acting as a focal point for expertise and for coordination of safety awareness raising.

Figure 10:
Policy Actions Overview 'Unprotected Networkers'



Summary of key points

- Weaker governance structures than in other clusters
- Less involvement by the public sector but with important coordinating role for the Safer Internet Centre
- Research is in evidence but no discernible effort at monitoring or evaluation
- Policy actions cover at most three pillars of EC strategy but little emphasis on positive content
- Little evidence of targeted budget support

CONCLUSION

Evidence at the European level in relation to children's internet use has been important for revealing the most prominent risks to children's online safety and has thereby assisted in formulating policy that is Europe-wide in scope. However, such findings always need to be interpreted through the prism of cultural context. The diversity of experiences of risk and harm and mediation makes for a much more complex picture than a simple ranking of risk across European countries might suggest.

For this reason, EU Kids Online has developed a more detailed classification of countries based on the kinds of activities undertaken, exposure to risk and harm and the nature and extent of mediation of internet safety experienced by young people in the 25 countries included in the survey. This has allowed for a more finely tuned perspective on the European landscape for young people's online experiences. It groups countries according to a more meaningful configuration of activities undertaken and risks encountered, thereby facilitating a better understanding of regional clusters and shared experiences. It also facilitates a deeper understanding of the national context through comparison with other countries, both similar and different.

The purpose of this report has been to add a further dimension to this analysis and to examine the extent to which the policy context within individual countries, its policy frameworks and policy actions/initiatives, help explain outcomes in terms of online risks, activities and mediation strategies. While the

data does not allow for establishing a causal relationship or explanation, better knowledge of what countries have done (or have not done) by way of investing in internet safety helps to contextualise the factors that shape children and young people's online experiences.

The importance which governments attach to the topic of internet safety can be gauged in a number of ways. The structures that are put in place and the actions implemented are two characteristics of policy at the individual country/regional level.

Creating a designated agency, responsible for overseeing internet safety is one way in which countries might prioritise e-safety. Yet, only a minority of countries does this.

Most countries in fact operate **a distributed model across different ministries and promote multi-stakeholder collaboration alongside existing self-regulatory arrangements.**

The comparison of public sector involvement with other policy actors is another way at looking at the importance given to internet safety, a factor which in many countries needs to be balanced with the role played by Safer Internet Centres.

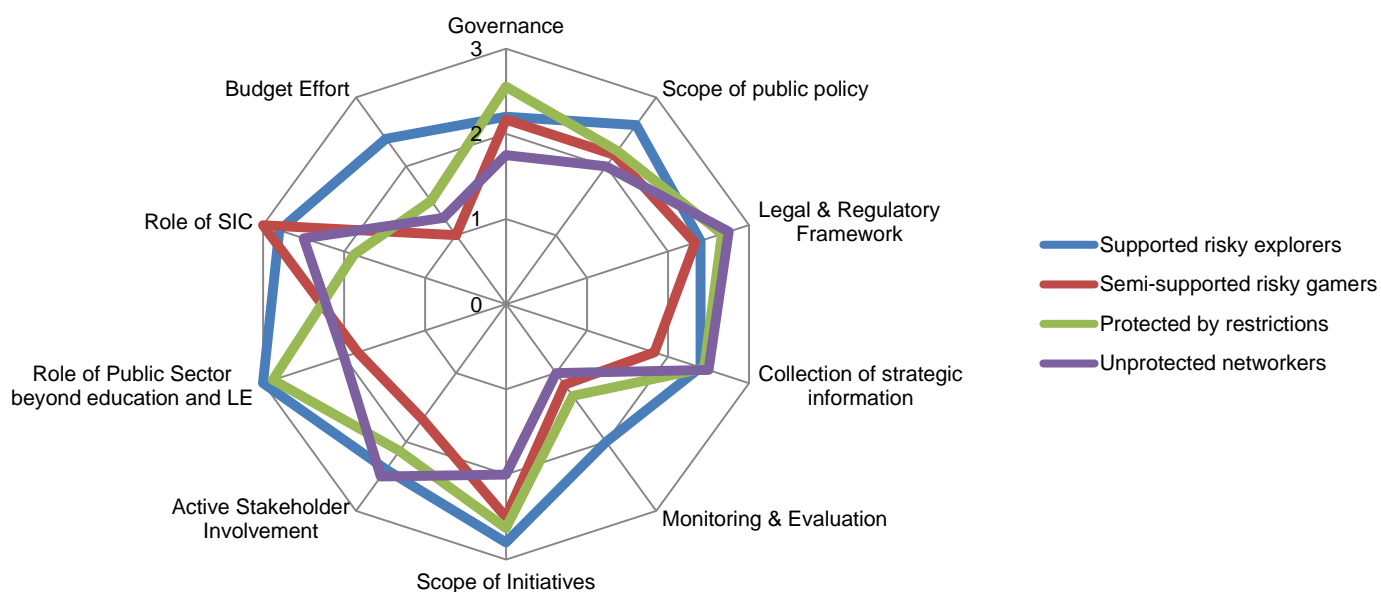
Given the complex issues involved and the very different ways public administration works in different countries, **there is no one single model or template for action.** Instead, it is necessary to look at outcomes across a range of policy actions to examine proactive engagement with online safety and to assess the extent to which this coincides with online experiences in the countries concerned.

Comparing cross-national differences between countries in the EU Kids Online survey reveals something of a **dividing line between parts of Europe that enjoy better support and those that receive somewhat less public support for internet safety**. Broadly, countries within the two clusters of **‘Supported Risky Explorers’** and **‘Protected**

by Restrictions’ engage more visibly and deploy more initiatives in promoting safer internet practices than those countries in **‘Semi-supported Risky Gamers’** or **‘Unprotected gamers’**.

Figure 11 combines all 10 indicators of policy implementation considered in this report.

Figure 11:
Policy Comparisons of 4 Clusters



Countries that are part of **‘Semi-supported risky networkers’** and **‘Unprotected networkers’** display a relatively uneven range of commitments. Noticeably, they invest less than other countries, have a lower level of public sector involvement, have less tangible evidence of coordination and commit less to monitoring or evaluation of policy actions. For this reason, Safer Internet Centres assume a more pronounced role in promoting online safety, in the absence of local or national initiatives.

By contrast, the countries in the **‘Protected by restrictions’** cluster perhaps have done more to establish structures, and to enact legal and regulatory frameworks around online safety than other parts of Europe, albeit characterized by a greater emphasis on protection and restriction to the detriment of a more comprehensive approach.

It is countries in the **‘Supported risky explorers’** cluster that arguably may be said to do more and to have a more balanced policy approach to internet safety. This is evidenced by high levels of role public sector involvement, working in a complementary way with Safer Internet Centres across a wide range of policy initiatives. Notably, in contrast to other countries, there is more evidence of targeted budget investment combined with monitoring and evaluation of policy outcomes. In terms of outcomes, it is in this group of countries that we find the higher levels of internet diffusion, greater levels of digital skill among both parents and children, and a more proactive approach to mediation alongside higher levels of both use and risk for young people.

Policy lessons to be drawn from this analysis suggest that rather than a single template or solution for safer internet policy, it is support for a broad spectrum of activities involving multiple stakeholders and using diverse methods that matters most. Coordination, whether that is undertaken by existing structures or by a designated agency or multi-stakeholder representative body, is therefore a key element in ensuring effective policy development.

It is also the case that countries have different starting points when it comes to internet safety: in some cases, instance in those countries in ‘Protected by Restrictions’ there is quite a long history of policy involvement on the part of both the public and private sector. In other regions in Europe, developing policies and implementing strategies for internet safety is more recent. For that reason, those parts of Europe that have had the longest experience of engaging with internet safety policy and of balancing the competing demands of promoting young people’s opportunities while protecting against the most pressing risks provide a crucial guide for future solutions.

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ENDNOTES

¹ EU Kids Online grouped countries according to the amounts and types of use and risk resulting in four categories or 'ideal types': 'Lower use, lower risk countries' (Austria, Belgium, France, Germany, Greece, Italy, Hungary); 'Lower use, some risk' countries (Ireland, Portugal, Spain, Turkey); 'Higher use, some risk' countries (Cyprus, Finland, the Netherlands, Poland, Slovenia, the UK); 'Higher use, higher risk' countries (Bulgaria, Czech Republic, Denmark, Estonia, Lithuania, Norway, Romania, Sweden) – a group which includes both wealthy Nordic countries and Eastern European countries (better called, 'New use, new risk'). See (Lobe, 2011) for further details.

² Benchmarking of Safer Internet policies in Member States and policy indicators. EC, DG Connect (2012-ongoing)

³ 24 of the 25 countries involved in the EU Kids Online study are included in this report. No data was available for Turkey as it is not included in the EC Benchmarking Study.

⁴ The Swedish Media Council is a government agency whose primary task is to promote the empowering of minors as conscious media users and to protect them from harmful media influences.

<http://www.statensmedierad.se/Om-Statens-medierad/In-English/About-us/>

Similarly, the Norwegian Media Authority includes research, safe internet use and parental guidance among its functions.

<http://www.medietilsynet.no/trygg-bruk/>

⁵ The Digital Agenda 2020 for Romania encompasses a range of measures to coordinate ICT policy across different government departments to meet EC targets.

<http://digitalagenda.ro/>

⁶ In Bulgaria in 2008, the National Child Strategy 2008-2018 was adopted by parliament with child protection and children rights as a key-policy priority. <http://www.unicef.org/ceecis/Bulgaria.pdf>

⁷ The Estonian Information Society Strategy 2013 is a sectoral development plan, setting out the general framework, objectives and respective

action fields for the broad employment of ICT in the development of knowledge-based economy and society in Estonia in 2007–2013.

<https://www.ria.ee/estonian-information-society-strategy-2013/>

⁸ The UK Council for Child Internet Safety (UKCCIS) is a multi-stakeholder group drawn from across government, industry, law, academia and charity sectors that work in partnership on internet safety. <https://www.gov.uk/government/groups/uk-council-for-child-internet-safety-ukccis>

⁹ See Federal Department responsible for youth protection in the media
<http://www.bundespruefstelle.de/bpjm/information-in-english.html>

¹⁰ See for instance:
http://www.stat.si/eng/novica_prikazi.aspx?id=5652

¹¹ National Cyber Security Strategy of Hungary.
http://www.nbf.hu/anyagok/Government%20Decision%20No%201139_2013%20on%20the%20National%20Cyber%20Security%20Strategy%20of%20Hungary.docx

¹² Safer Internet Centre, Austria at
<http://www.saferinternet.at/english/>